

Exercise Trends: Inc Impact of COVID-19 - UK - July 2020

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

What you need to know

Nearly a third of consumers take part in exercise to relieve stress, making it the second most common motivator behind only fat loss. The mental benefits of exercise are now considered just as important as the physical benefits, with heightened stress levels surrounding COVID-19 only likely to spur this on further.

The impact of COVID-19 on the health and fitness sector has been somewhat polarising. On one hand, private health and fitness clubs, public leisure centres and organised sport have suffered greatly due to an extensive period of closures lasting around four months in most cases. On the other hand, interest in and usage of in-home exercise products and services such as fitness equipment and virtual platforms have surged.

Competition between the offline and online fitness markets has intensified, and operators on both sides are racing to incorporate the best of both. Venue operators will need to expand their digital content offers and emphasise their position at the centre of communities. Digital brands should use individuals' data to offer hyper-personalised coaching to meet their unique health and fitness goals.

Whilst health and fitness venues will take a significant hit in 2020, there is good reason for operators to be optimistic about the long-term future. COVID-19 has heightened awareness about the benefits of exercise for both physical and mental health, with a third of consumers saying exercise has become a bigger priority for them since the start of the outbreak.

Key issues covered in this Report

- The impact of COVID-19 on the health and fitness sector.
- The long-term opportunities in home fitness.
- How, where and why consumers exercised prior to COVID-19, and what changes have occurred as a result of the pandemic.



“Competition between the offline and online fitness markets has intensified, and operators on both sides are racing to incorporate the best of both. Venue operators will need to expand their digital content offers and emphasise their position at the centre of communities. Digital brands should use individuals' data to offer hyper-personalised coaching to meet their unique health and fitness goals.”

– Lauren Ryan, Leisure

Analyst, 12 July 2020
Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

- **Consumers' attitudes towards mental health and the role of exercise within this.**

Covered in this Report

This Report provides an in-depth look at the exercise market in the UK by analysing exercise and fitness trends, consumers' behaviours and attitudes.

COVID-19: Market context

This Report was prepared on 9 July 2020.

The first COVID-19 cases were confirmed in the UK at the end of January 2020 with a small number of cases in February. The government focused on the 'contain' stage of its strategy, with the country continuing to operate much as normal. As the case level rose significantly, the government ordered the closure of non-essential stores on 20th March 2020.

A wider lockdown requiring people to stay at home except for essential shopping, exercise and work 'if absolutely necessary' followed on 23rd March. Initially, a three-week timeframe was put on the measures, which was extended in mid-April for another three weeks.

On 10 May 2020, the Prime Minister announced revised guidance, recommending that people who could not work from home should return to the workplace, and giving people more scope to spend time out of the home. Further relaxations to lockdown rules were announced in the week of 23rd May, including gradual reopening of non-essential retailers and increased opportunities for social interaction across households. Hospitality businesses were allowed to reopen in England on 4 July.

Health and fitness context

On 20 March, Prime Minister Boris Johnson ordered the closure of gyms and leisure centres across the UK to fight the spread of COVID-19. The large majority (if not all) of gyms and leisure centres reacted quickly to the news, automatically freezing memberships to ensure members would not be paying unnecessarily.

The UK government's stay-at-home guidance acknowledged the importance of physical activity for mental and emotional wellbeing. When further lockdown rules were implemented on 23 March and people could only leave the house for essential purposes, this included exercising once per day.

On 11 May, the public in England were allowed 'unlimited exercise' and could rest and sit outside or play sports with members of their own household.

From 13 May, sports courts including basketball and tennis courts, bowling greens and playing spaces such as golf courses were able to reopen. Other outdoor sports such as angling were also allowed to resume. All of these

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

activities were to be undertaken alone, with members of the same household or with one other person from a different household.

On 23 June, the government announced the relaxation of the two-metre social distancing rule from 4 July, instead changing it to 'one metre plus' meaning two metres where possible but at a minimum, one metre.

As a result, most leisure facilities were able to reopen on 4 July including outdoor gyms and playgrounds. This included recreational sport in outdoor locations with the exception of close-contact team sports. However, 'close proximity' venues such as indoor gyms and swimming pools remained closed.

Following lobbying from industry body ukactive, Culture Secretary Oliver Dowden announced on 9 July that outdoor pools and certain team sports could reopen from 11 July and indoor gyms, pools and sports facilities may reopen from 25 July.

Economic and other assumptions

Our economic assumptions are based on the illustrative scenario included in the Bank of England's Monetary Policy Report, released on 7th May 2020. The scenario suggests that UK GDP could fall by 14% in 2020, recovering by 15% in 2021, and that unemployment will reach 8% by the end of the year, easing slightly to 7% by the end of 2021. The current uncertainty means that there is wide variation on the range of forecasts, however, and the numbers presented in the BoE's illustrative scenario are at the more pessimistic end of the spectrum.

We are working on the assumption that a vaccine will be available by mid-2021, but that there will be continued disruption to both domestic and global markets for some time after that.

As long as there is not a second wave of infections, social distancing measures should be gradually relaxed over the course of 2020, but we don't expect industries such as hospitality, travel and live entertainment to return to any kind of normality until a vaccine is introduced.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Covered in this Report
- COVID-19: Market context
- Health and fitness context
- Economic and other assumptions

EXECUTIVE SUMMARY

- **Impact of COVID-19 on the health and fitness sector**
Figure 1: Expected impact of COVID-19 on the health and fitness sector, short, medium and long term, 12 July 2020
- **Market background**
- **Activity levels on steady incline**
Figure 2: Levels of activity in England, November 2015–November 2019
- **COVID-19 severely restricted exercise options...**
- **...before venues were allowed to reopen**
- **Private health and fitness club membership jumped prior to COVID-19**
Figure 3: Membership of private health and fitness club prior to COVID-19 outbreak, June 2020
- **Leisure centre membership lags behind**
- **Companies and brands**
- **Fitness clubs pivot to digital**
- **Connected fitness brands hot property**
- **Peloton expands digital presence**
- **'Mental health gym' concept launched in Manchester**
- **Joe Wicks launches daily PE With Joe**
- **Third Space launches kids' club**
- **Sport Climbing set to make Tokyo Olympics debut**
- **The consumer**
- **Seven in 10 Brits exercised regularly prior to lockdown**
Figure 4: Exercise frequency – NET, 2–13 March 2020
- **Opportunity to push daily exercise**
Figure 5: Exercise frequency, 2–13 March 2020
- **Exercise frequency increased during lockdown**
Figure 6: Days done 30 minutes or more physical activity in last week, 3 April–22 June 2020
- **Walking most common exercise**
Figure 7: Exercise type, 2–13 March 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Multiple exercise types mean more regular exercise**
- **Mental benefits of exercise now play a crucial role**
- **Corporate wellness services more crucial during homeworking age**
Figure 8: Exercise motivations – NET, 2-13 March 2020
- **COVID-19 will only strengthen preference for outdoor exercise**
Figure 9: Exercise locations, 2-13 March 2020
- **Consumers adapt to new locations**
Figure 10: Attitudes towards attending a gym, June-July 2020
- **Growing opportunities to link mental health and exercise**
Figure 11: Attitudes towards mental health and exercise, 2-13 March 2020
- **Exercise events provide more than just a challenge**
Figure 12: Participation and interest in exercise challenges and events, 2-13 March 2020
- **Social needs can make fitness more enjoyable for over-55s**
Figure 13: Exercise barriers, 2-13 March 2020
- **What we think**

THE IMPACT OF COVID-19 ON THE HEALTH AND FITNESS SECTOR

- **The market**
- **COVID-19 severely restricted exercise options...**
- **...before venues were allowed to reopen**
- **Equipment manufacturers face supply issues**
- **The consumer**
- **Consumers adapt to new locations**
- **COVID-19 will only strengthen preference for outdoor exercise**
- **Price will be critical for younger consumers upon reopening of venues**
- **Opportunity to boost walking and cycling in the 'active travel' revolution**
- **Equipment-less fitness back in vogue...**
- **...but lockdown presents opportunity for equipment rental**
- **Mental benefits of exercise now play a crucial role**
- **Social fitness can provide an antidote from lockdown isolation**
- **Companies and brands**
- **Fitness venues pivot to digital**
- **Existing content platforms grab new partnerships**
- **Connected fitness equipment market heats up**
- **COVID-19: Market context**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

ISSUES AND INSIGHTS

- **COVID-19 accelerates demand for connected fitness**
- **The facts**
- **The implications**
- **Remote working era needs new approaches to corporate wellness**
- **The facts**
- **The implications**

THE MARKET – WHAT YOU NEED TO KNOW

- **Obesity epidemic major health problem**
- **Activity levels on steady incline**
- **COVID-19 severely restricts exercise options**
- **Consumers adapt to new locations**
- **Exercise frequency increased during lockdown**
- **Private health and fitness club membership jumped prior to COVID-19**
- **Leisure centre membership lags behind**
- **Individual exercise more popular than group sports**

MARKET BACKGROUND

- **Over-55s population continues to grow**
Figure 14: Life expectancy at attained age (years), by gender, England, 2001-19
- **Obesity epidemic major health problem**
Figure 15: Adult (over 16 years old) body mass index, by weight category, England, 1993-2018
- **Activity levels on steady incline**
Figure 16: Levels of activity in England, November 2015-November 2019
- **Interest in exercise on seasonal cycle**
Figure 17: UK trends in Google searches for 'exercise', January 2010-20
- **Private health and fitness club membership jumped prior to COVID-19**
Figure 18: Membership of private health and fitness club prior to COVID-19 outbreak, June 2020
- **Leisure centre membership lags behind**
- **Sports participation broadly stable**
Figure 19: Total sport played, July 2017-July 2019
- **Individual exercise more popular than group sports**
Figure 20: Types of sport played, July 2017 and July 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

MARKET DRIVERS

- **COVID-19 severely restricts exercise options**
- **Fitness venues forced to shut**
- **Lockdown enforces exercise restrictions**
- **Facilities given reopening date**
Figure 21: Attitudes towards attending a gym, June-July 2020
- **Consumers and brands adapt to new locations**
- **Home**
Figure 22: Participation in home workouts since COVID-19 outbreak, 26 March-16 April 2020
- **Outdoors**
- **Wellbeing higher on the priority list**
Figure 23: Changes in lifestyle priorities since COVID-19 outbreak, 7-14 May 2020
- **Exercise frequency increased during lockdown**
Figure 24: Days done 30 minutes or more physical activity in last week, 3 April-22 June 2020
- **Growing spotlight on mental health**
- **Financial situation linked with activity levels**
Figure 25: Exercise activity, by financial situation, March 2020

COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- **Fitness clubs pivot to digital**
- **Connected fitness brands hot property**
- **Peloton expands digital presence**
- **'Mental health gym' concept launched in Manchester**
- **Joe Wicks launches daily PE With Joe**
- **Third Space launches kids' club**
- **Sport Climbing set to make Tokyo Olympics debut**

LAUNCH ACTIVITY AND INNOVATION

- **Fitness clubs pivot to digital**
- **Les Mills grabs a suite of content partnerships**
- **David Lloyd launches Clubs@Home**
- **London boutique 1Rebel unveils digital class offer**
- **Home gyms get re-invented**
- **Peloton expands digital content presence**
- **Connected fitness brand Mirror bought by retailer Lululemon**
- **FORME Life launches to pre-order**
- **Holistic wellbeing trend goes mainstream**
- **'Mental health gym' launched in Manchester**
- **David Lloyd opens wellbeing-focused pop-up restaurant**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- Digne Fitness streams virtual series for Mental Health Awareness Week
- Fitness for the whole family
- Joe Wicks launches daily PE With Joe
- Third Space launches kids' club
- Unconventional exercise offers novel alternatives
- Tough Mudder brand acquired by Spartan
- Ninja Warrior rapidly expands obstacle sites across the UK
- Sport Climbing set to make Tokyo Olympics debut
- Corporate wellness gets another look
- Hussle launches corporate fitness service

THE CONSUMER – WHAT YOU NEED TO KNOW

- Seven in 10 exercised regularly prior to lockdown
- Opportunity to push daily exercise
- Walking most common exercise
- Multiple exercise types mean more regular exercise
- Mental benefits of exercise now play a crucial role
- Corporate wellness services more crucial during homeworking age
- COVID-19 will only strengthen preference for outdoor exercise
- Growing opportunities to link mental health and exercise
- Exercise events provide more than just a challenge
- Social needs can make fitness more enjoyable for over-55s

EXERCISE FREQUENCY

- **Exercise frequency boosted by lockdown**
Figure 26: Exercise frequency – NET, 2-13 March 2020
- **Opportunity to push daily exercise**
Figure 27: Exercise frequency, 2-13 March 2020

EXERCISE TYPES

- **Opportunity to boost walking and cycling in the 'active travel' revolution**
Figure 28: Exercise type, 2-13 March 2020
- **Race to turn lockdown joggers into lifetime runners**
Figure 29: Future intentions to use fitness technologies, by usage of fitness technologies, 4-18 June 2020
- **Multiple exercise types mean more regular exercise...**
Figure 30: Exercise frequency, by repertoire analysis of exercise types – NET, 2-13 March 2020
- **...leading to popular cross-training combinations**
Figure 31: Exercise type, by exercise type, 2-13 March 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Younger consumers prefer more intense workouts**

Figure 32: Exercise type, by age, 2-13 March 2020

EXERCISE MOTIVATIONS

- **Mental benefits of exercise now play a crucial role**
- **Fat loss key motivator for a third**
- **Prompts shift from 'fitness brand' to 'wellness brand'**

Figure 33: Exercise motivations – NET, 2-13 March 2020

- **Appearance paramount for younger Brits...**
- **...but it's time to change the message**

Figure 34: Exercise motivations – NET, by age, 2-13 March 2020

- **Corporate wellness partnerships will appeal to stressed out professionals**
- **COVID-19 shines spotlight on fitness of older adults**
- **Exercises chosen according to motivations**

Figure 35: Motivations to exercise, by exercise types, 2-13 March 2020

EXERCISE LOCATIONS

- **Lockdown surge for home exercise options**
- **Urban living needs smart solutions**
- **Opportunity to utilise exercise equipment in more homes**
- **Brands show flexibility to get in the door**
- **Tech solutions bring the in-person experience home**
- **Pressure to sustain virtual exercise habits past lockdown**
- **Safety critical for indoor venues**

ATTITUDES TOWARDS MENTAL HEALTH AND EXERCISE

- **Nearly seven in 10 care more about mental health than in the past**

Figure 37: Attitudes towards mental health, 2-13 March 2020

- **Growing opportunities to link mental health with exercise**
- **Holistic exercise concepts appeal to over half of Brits**

Figure 38: Attitudes towards exercise and mental health, 2-13 March 2020

PARTICIPATION AND INTEREST IN EXERCISE CHALLENGES AND GROUPS

- **Exercise clubs and challenges tap into 'social fitness' trend**

Figure 39: Participation in exercise challenge/group – NET, by Mintel identity trends driver statement, 2-13 March 2020

- **Nearly a third would tackle obstacle course in the future**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Exercise Trends: Inc Impact of COVID-19 - UK - July 2020

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 40: Participation and interest in exercise challenges and events, 2-13 March 2020

BARRIERS TO EXERCISE

- **Social needs can make fitness more enjoyable for over-55s**
- **Time barrier eased through lockdown**

Figure 41: Exercise barriers, 2-13 March 2020

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.